



26 July 1979

MEMORANDUM FOR: Secretary, Executive Committee

FROM : Clifford D. May, Jr.  
Associate Deputy Director for  
Administration

SUBJECT : Information Handling Study

REFERENCE : DDCI Memorandum, Same Subject, dated  
22 May 1979

1. Attached are the proposed terms of reference and study plan for the subject study.

2. The study team has reexamined the definition of the information handling problem and related issues. The restatements of problem and issues contained in the attached terms of reference also respond to the DDCI's desire for an action oriented plan that provides consideration of "doing more with less."

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3. It is requested that these documents be considered for approval by the Executive Committee at the next meeting. The team leader, [redacted] will be available to provide a briefing if desired and to respond to specific questions regarding the attachments.

[redacted]  
Clifford D. May, Jr.

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Attachments:  
As stated

All portions of this document are UNCLASSIFIED.

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TERMS OF REFERENCE - INFORMATION HANDLING STUDY

The following paragraphs constitute the proposed terms of reference for the Information Handling Study approved by the DDCI on 7 May 1979.

The definition of Information Handling contained in EXCOM-19-79 is accepted as the most appropriate for the purposes of this study:

Information handling in CIA is the systematic creation, movement, use, storage, retrieval, and disposal of intelligence and management information with the support of automated or other clearly identifiable processes and with due regard for control of sensitive and compartmented data.

The Information Handling problem has been restated to clarify the reason for the study.

Problem: There is concern that traditional institutions dealing with provision of information services are becoming less effective as new technologies evolve, demand for service grows, and Agency resources shrink. There needs to be a reconciliation of demand vs. supply, a strategy for future investment, and assurance that appropriate institutions exist to execute the strategy.

The major goal of the Information Handling Study is to develop a comprehensive information handling strategy for the Agency and, if appropriate, define a management structure for more formal continuing coordination of the Agency's information handling activities. The proposed elements of the strategy are: management, organization, operation, security, technology, and personnel.

The study will focus on the provision and use of information services within the Agency. Information services will be defined as those disciplines and technologies whose purpose is to facilitate information handling. The study will address the interface of the Agency information systems with collection systems.

The primary product of the study will be a strategic plan covering the next ten-year period, addressing provision and use of information services. The strategic plan will

establish goals and priorities, speak to the resources required to address those goals, and set policy governing acquisition, use and disposition of resources. The structure of the plan will be such that subsequent planning for implementation can be delegated to lower levels. The plan will allow for orderly piecewise execution in consonance with resource allocations and operational imperatives.

If warranted, the plan will be accompanied by recommendations for changes in management systems and organizational structure.

Issues which the study will include, but not be limited to are:

a. Management

To what degree can central management of information handling contribute to the provision of information services? While there is popular enthusiasm for further centralization of management functions associated with information handling, there needs to be a careful assessment of what functions need to be centralized to improve provision and use of information services.

b. Standards

To what degree can standardization contribute to the efficiency and effectiveness with which information services are provided? Standards could cover equipment, programming, engineering, documentation, or management systems.

c. Structure

To what degree should technology influence Agency organization? The apportionment of missions to some components is based, in part, on historic technological definitions which may now be obsolete. As technology evolves, a reallocation of the division of labor might be useful and even necessary to clarify roles. However, the value of organizational realignment must be weighed against the employee morale, personnel management, and budgetary impact of change.

d. Compartmentation

To what degree can systems and data bases be shared without jeopardy to security and compartmentation? Increased efficiency will often

result from aggregation of user needs and resource sharing. Strategies need to be identified that will maximize efficiencies within constraints imposed by security and compartmentation.

## INFORMATION HANDLING STUDY PLAN

The following paragraphs outline a plan for conduct of a study of information handling within CIA. The primary objective of this study is development of a strategic plan for the provision and use of information services.

In formulating a methodology for the study, one factor was of primary influence:

Participation by those components affected by the plan is critical to its ultimate acceptance and implementation.

The schedule has been developed within the 12-month constraint stipulated. Seven tasks are defined below and a milestone chart is attached.

While priority will be given to production of the strategic plan, it is anticipated that near-term issues will be found that should be resolved by senior Agency management within the study time frame. Therefore, the Task Force will submit separate issue papers to EXCOM with recommendations for resolution whenever warranted.

There is no apparent need for sustained contractual support. Limited amounts of consultative service may be desirable. FY-80 funding of \$10K appears ample for consultation and limited team travel.

Task one of the study will be interaction with each component which provides information services. The end result will be a coherent and consistent representation of each component's services and plans, prepared by the study group and verified by the respective component.

Task two will be an analysis of the provider component plans for the purpose of identifying required coordination. Task two will highlight the assumptions of information service use on which near-term investments are predicated.

Task three will be the process of developing with each component a representation of its plans for the use of information services.

Although there is some risk that the amount of Task Force time that might be consumed by tasks one and three may be greater than estimated, current estimates are judged to

be reasonable. However, alternate strategies are available to stay within schedule and will be proposed if experience dictates the need.

Task four will be the analysis and aggregation of the projections for the use of information services and the identification of issues related to the use of these services.

Task five of the study will involve the correlation of the planning for the provision and use of information services. The collection and analysis steps in tasks one through four will enable the Task Force to develop a "cross-impact matrix" which will show the plans of both providers and users of information services. This "matrix" should be available on/about the ninth month of the study.

Task six will be an analysis of the matrix developed in task five to yield:

- o residual, unresolved areas of overlap and duplication
- o major gaps between the demand for information services and their supply
- o the impact of postponing or accelerating resource investments.

With this information in hand, the Task Force will develop various applicable planning strategies for EXCOM consideration. EXCOM's choice(s) among these alternate strategies will determine the direction of the Task Force's remaining task - the preparation of the final report.

Task seven - Based on the guidance received from EXCOM, the strategic plan will be finalized and submitted for their review and approval. Any remaining unresolved issues will be documented along with recommendations for resolution.

MILESTONES	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
<b>TASK # 1</b>												
1.1 Identify/prioritize providers	▲▲											
1.2 Develop interview format	▲▲											
1.3 Sample survey	▲▲											
1.4 Develop schedule	▲▲											
1.5 Survey/verify	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
<b>TASK # 2</b>												
2.1 Catalog services/providers					▲	▲						
2.2 List provider planning issues						▲	▲					●
<b>TASK # 3</b>												
3.1 Identify/prioritize users	▲▲											
3.2 Sample survey	▲▲											
3.3 Develop schedule	▲▲											
3.4 Survey/verify	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲	▲
<b>TASK # 4</b>												
4.1 Catalog services/users					▲	▲						
4.2 List user planning issues						▲	▲	▲	▲	▲	▲	▲
<b>TASK # 5</b>												
5.1 List users vs. providers							▲	▲	▲	▲	▲	▲
5.2 Develop cross-impact matrix								▲	▲	▲	▲	●
<b>TASK # 6</b>												
6.1 Identify information services planning issues								▲	▲	▲	▲	▲
6.2 Develop options for planning strategy and management structure for EXCOM consideration									▲	▲	▲	▲
<b>TASK # 7</b>												
Prepare final report										▲	▲	▲
Interim reports to EXCOM						▲		▲				
Present to EXCOM											▲	



DRAFT OUTLINE FOR INFORMATION HANDLING STRATEGIC PLAN

- I. Executive Summary
- II. Purpose
- III. Projected Requirements for Information Services
- IV. Planned Provision of Information Services
- V. Demand vs. Availability
- VI. Applicable Technology Trends
- VII. Organization Impact
- VIII. Goals and Priorities

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